



Euromonitor
International

Where Consumers Shop for Retail Tissue and Hygiene

August 2026

KEY FINDINGS

Key findings

Value-driven shopping reshapes tissue and hygiene retail channel landscape

Our expert's view of channel dynamics for retail tissue and hygiene

INDUSTRY PERFORMANCE

Global market growth remains fragile amid socioeconomic headwinds

Channel transformation has become the industry's key story

Despite supermarkets' dominance, e-commerce rises to the second largest channel

Different consumer needs are creating different channel winners

OFFLINE RETAIL

Offline retail anchors category spending but takes different forms across regions

Replenishment and wellness priorities are creating different offline retail winners

Discounters are redefining value across grocery retail

Specialist retailers thrive where expertise and category engagement matter

Turkey: Discounters are turning pack architecture into a competitive advantage

Brazil: Farmácia Popular expands adult incontinence access through pharmacies

Small local grocers remain essential where affordability meets accessibility

Offline retail still wins on proximity, trust and value

RETAIL E-COMMERCE

E-commerce has become a key growth engine

Replenishment routine, rather than seasonality, defines e-commerce performance

US and China drive e-commerce gains through fast discovery and frictionless refills

From shelf to screen: Social commerce is rewriting the rules of scale

Baby nappies/diapers lead online sales while facial tissues lead speed of scale

Different e-commerce models are creating different paths to growth

Despite Amazon's e-commerce leadership, the wider channel mix is evolving

Marketplace dominance reflects the category's replenishment and bulk buying nature

Marketplaces are expanding beyond baby care into everyday essentials

Winning on marketplaces still depends on local retail ecosystems

E-commerce is reshaping scale, discovery and category strategy

CONCLUSION

Consumer needs will reshape channel leadership

How to win

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For more information on this report, further enquiries can be directed via this link www.euromonitor.com/where-consumers-shop-for-retail-tissue-and-hygiene/report.